



CANADIAN TAX CHECKLIST

Income Slips:

- Employment Income (T4, T4A)
- Employment Insurance Benefits (T4A or T4E)
- Investment Income - Interest, Dividends, etc. (T3, T5, T5008, T5013)
- Old Age Security (T4A-OAS)
- CPP Benefits (T4AP)
- Pensions and Annuities (T4A, T4RIF, T4RSP)
- Social Assistance Payments (T5007)
- Workers' Compensation Benefits
- Tuition or Education Receipts (T2202)
- Scholarships and Bursaries (T4A)
- Foreign Slips (W-2, 1099, 1042-S)
- Advanced CWB Payments (RC210)
- All Other Tax Slips

Other Documents:

- Property Sale/Purchase Documents (if property sold/purchased in 2024)
- Short-Term Rental Permit (if renting on AirBNB or other similar sites)
- Rental Income & Expense Summary
- Business Income & Expense Summary
- Disability Tax Credit Certificate
- Declaration of Conditions of Employment (T2200)
- Volunteer Firefighters Certificate or Search and Rescue Volunteers Certificate

Documents for Credits & Deductions:

- *NEW*** FHSA Contribution Receipts
- RRSP/RPP Contribution Receipts
- Property Tax and/or Rent Receipts
- Charitable Donation Receipts
- Political Contribution Receipts
- Union or Professional Dues Receipts
- Child Care Expense Receipts
- Moving Expense Summary/Receipts
- Carrying Charges, Brokerage Fees, and Interest Expenses on Investments
- Interest Paid on Student Loans
- Home Accessibility Expenditures
- Home Office Expense Summary (must have signed copy of T2200 from employer)
- Spousal and Child Support Receipts
- Summary of Adoption Expenses
- School Supplies Receipts (teachers)
- Receipts for Digital News Subscriptions
- Receipts for Eligible Tools (only eligible tradespersons or apprentice mechanics)